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| **<Project Name>**  Project Startup & Kickoff Checklist (M1170) |

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| **Project Name:** |  | **PlanView Number:** |  |
| **Project Sponsor:** |  | **Project Size:** |  |
| **Project Director:** |  | **Project Start Date:** |  |
| **Project Manager:** |  | **Project End Date:** |  |

1. **Startup Reminders**

| **Startup Reminder** | **Status** |
| --- | --- |
| Startup activities could begin after and / or in parallel with the kick-off meeting activities. |  |
| Establish a Project Notebook / Binder and document repository. Also, prepare a list of Team Members contact numbers. |  |
| Define and confirm Team Communications (What, How, and When). |  |
| Establish the physical work environment. Confirm space and workstations requirements availability (Phone lines, desk tops, printer connections, etc.). |  |
| Secure team member’s Logons and Security access. |  |
| Send email to [*its.is.sns@umich.edu*](mailto:its.is.sns@umich.edu) announcing project and possible security involvement needs. Ask who should be invited to kick off.- |  |
| Identify project roles and responsibilities with associated training needs, and prepare training schedule, where necessary. |  |
| Request laptops, beepers, and cell phones, where necessary. |  |
| Request needed software / tools such as PM Tools, Office Suite, etc. |  |
| Define, baseline and begin implementing the Project Schedule / Plan. |  |
| Set-up Project Control Logs for Issues, Risks, and Change/Scope Control. |  |

1. **Reminders for Project Kickoff Meeting**

*Use this checklist to track items necessary for a successful project kickoff meeting. Delete this instructional paragraph from your final draft.*

| **Startup Reminder** | **Status** |
| --- | --- |
| 1. Prepare Meeting Agenda. A formal kick-off meeting must be scheduled immediately after approval of the Project Charge and completion of the Project Definition documents. During the meeting, the contents of the Project Charge and definition documents must be fully articulated. Thus, it must include the following items as part of the agenda: |  |
| * Scope of Project |  |
| * Work Approach |  |
| * Roles & Responsibilities (Project Organizational Chart) |  |
| * Management Approach (Issues, Change, Risks, Quality, etc.) |  |
| * Project Timeline (Duration & Schedule of Deliverables) |  |
| * Project Schedule / Plan (Milestones, WBS, etc.) |  |
| * Project Status Reviews (Frequency, Participants, Expectations, etc.) |  |
| * Project Constraints, Assumptions, Critical Success Factors (CSF) |  |
| * Preliminary Risk Mitigation Strategies |  |
| * Methodologies, Standards, or Guidelines to Follow |  |
| 1. Schedule the Meeting. Confirm the date, place, and time. Send notice with at least a two-week lead-time. |  |
| 1. Invite Project Team Members, Stakeholders, Departmental Interfaces, and other Key Players. |  |
| 1. Invite Key Senior Management to stress the importance of Project. |  |
| 1. Confirm Attendance of all Meeting Participants (Make sure your Stakeholders are able to attend). |  |
| 1. Capture minutes, issues, and action items during the meeting. Be sure to send out minutes and action items within three days after the kickoff meeting. |  |

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**Document Change Control**

**Project Startup and Kickoff Checklist (M1170)**

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| --- | --- | --- | --- |
| **Version Number** | **Date** | **Revision Author** | **Description** |
| 1.0 | 10/08/07 | PSM-KS | Draft New Template Format (archived original format available via document owner) |
| 1.0 | 10/15/07 | PSM-KS | Version approved for use. |
| 2.0 | 04/26/08 | PSM-KS | Converted to .docx format; added file path to footer. |
| 2.1 | 8/27/10 | PSM-KS | Updated to include references to ITS |
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